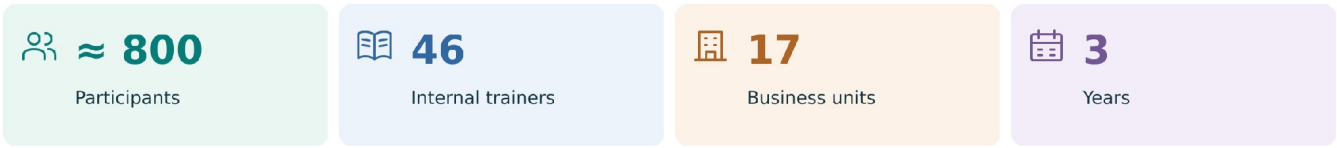
Consultative Broker Engagements

Designing and implementing a custom sales program

KJ Instructional Design Portfolio

I created and managed a national learning program to help underwriters strengthen broker relationships and apply consultative sales skills. My work included needs analysis, vendor selection, instructional design, and trainer support, with reinforcement and evaluation extending beyond the classroom.



The challenge

An insurance organization without a traditional direct sales function needed to build the consultative sales capabilities of its underwriting teams. Some leaders approached broker relationships primarily from a technical service mindset and needed support to see the value of a more consultative approach.

The program had to fit a relationship-focused company culture and work across different business units, product lines, and locations. It needed a shared learning structure with room for teams to adapt examples and application to their own products.

Needs analysis and vendor selection

I partnered with the Director of Marketing to assess the need and first explored internal subject-matter expertise. With no internal sales function to draw on, I researched external providers and identified four potential vendors. The project team considered budget, customization, and fit with the company’s values and broker relationships.

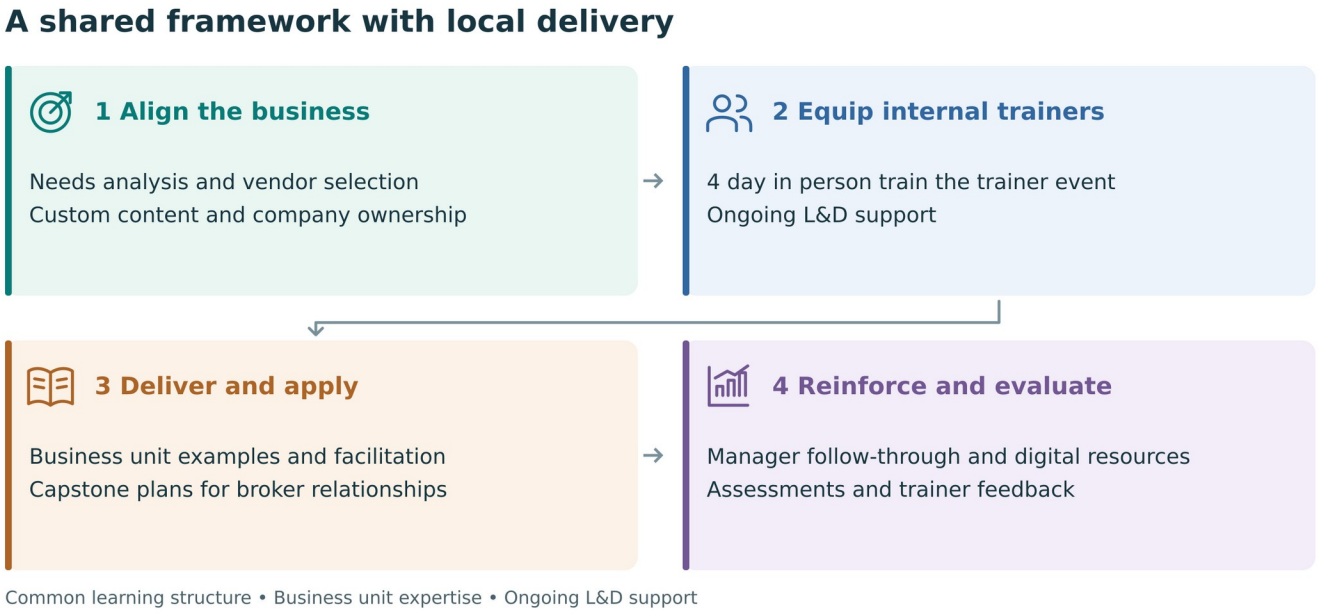
We selected a boutique training firm that agreed to company ownership of the content and an internal train-the-trainer model. This gave business units the flexibility to teach the material in ways that fit their teams and helped build internal support for the program.

Pilot before broader rollout

After meeting with business units, the vendor proposed the SOURCE sales model as the foundation for custom content. We tested an abbreviated version with the Early Career Program. Positive feedback on the content and master trainers supported the decision to expand to the broader underwriting population.

How the program worked

An external master trainer prepared internal trainers, who delivered the program within their business units. L&D provided consultation, learning resources, event coordination, assessment support, and ongoing trainer guidance.



Prepare trainers for local delivery

I recommended at least two trainers per business unit so facilitators had a partner during delivery. Preparation included formal training, practice, coaching, facilitator resources, content-review meetings, and rehearsals to work through timing, activities, co-facilitation, and local examples.

Manage implementation across business units

As program manager, I was the central contact for the vendor, project team, 46 trainers, L&D, and operational leadership. I coordinated implementation across 17 business units, provided ongoing needs analysis and evaluation, and designed and developed eLearning resources.

I developed trainer logistics guidance, participant and manager communications, learner materials, and event management workflows. These resources clarified responsibilities before, during, and after delivery and made implementation more consistent.

Connect learning to everyday work

A capstone asked participants to identify broker relationships, plan how to apply the tools, and discuss accountability with their managers. Coaching, recap videos, worksheets, manager guidance, and follow-up assessment supported continued application.

The result

Over three years, the program reached approximately 800 participants through 46 trainers across 17 business units. The train-the-trainer model expanded delivery through internal experts while maintaining a shared learning structure and ongoing L&D support.

The program grew to include executive-leader learning, eLearning, and video resources. It gave underwriters a common approach for consultative conversations, building broker relationships, and identifying sales opportunities.

Evaluation and improvement

Pre- and post-training 180-degree assessments incorporated learner and manager perspectives. Surveys, trainer observations, and capstone discussions helped identify areas for reinforcement. I also hosted post-training meetings with trainers to understand what was working and where support needed to improve.

Feedback shaped the support model

Trainer feedback

WHAT WE HEARD
Preparing to teach took substantial time.

WHAT CHANGED
L&D took on on-site logistics. A coordinator was later hired to support CBE and other instructor-led events.

Leader feedback

WHAT WE HEARD
Leaders needed help sustaining the skills in their business units.

WHAT CHANGED
A separate leader program was created and implemented to strengthen the sales mindset and support continued application.

These changes helped the program respond to the practical needs of trainers and leaders as implementation continued.

Skills demonstrated

Needs Analysis | Program Management | Train-the-Trainer | Instructional Design | Vendor Partnership | Stakeholder Management | Blended Learning | Learning Evaluation

Confidentiality

Original program materials are owned by my previous employer and are not reproduced here. The graphics were created for this portfolio. This case study describes my contributions and the program's scope.